Training Process Overview

Training Process Overview

This presentation will cover all the steps and instructions to be a certified Application Assister or certified Agent with the Kentucky Health Benefit Exchange. Certified Assisters and Agents help consumers with applications and enrollment into Qualified Health Plans and the state Medicaid program.

Requirements

State Certification in Kentucky

1. Take FFM Training Annually
2. Send FFM Certificate of Completion
3. Complete KHBE Training

Requirements

1

Take FFM Training Annually

State Certification in Kentucky

Required Training

FFM Training

- All participants, both Agents and Assisters must complete the FFM Training for their role.
- FFM Training requires annual recertification

Requirements

2

State Certification in Kentucky

Send FFM Certificate of Completion

FFM

- Completing the training and passing the exam, then submitting your completion certificate is a condition of participation in the state of Kentucky.
- You must send your Certificate of Completion to KHBE at KHBE.kynect@ky.gov for record keeping.
- KHBE will conduct periodic audits and those who are not in compliance will not be allowed to assist consumers.
- You will receive an email notice of non-compliance and will be locked out of your Kentucky Online Gateway (KOG) account until you are in compliance.
- A guide is available on the KHBE website with steps for saving and printing your FFM Certificate of Completion.

Email: khbe.kynect@ky.gov

Fax: 1-502-573-2090

Mail: KHBE
Assister Certificate Manager
8 Mill Creek
Frankfort, KY 40601

Requirements

3

Complete KHBE Training

State Certification in Kentucky

KHBE State Training

- All Assisters must complete KHBE State training.
- Agents who wish to assist Medicaid applicants or households with both QHP and Medicaid eligible individuals must complete the KHBE State training. It is not mandatory for agents to assist individuals with Medicaid and/or KCHIP.

- KHBE does not require annual recertification

The KHBE system does not automatically generate a completion certificate.

A KHBE Certificate of Completion is recorded by the Health Benefit Exchange office. A copy of the Kentucky State Training Certificate of Completion can be provided upon request. Requests may be sent via email to KHBE.kynect@ky.gov.

Requirements

State Certification in Kentucky

1. Take FFM Training Annually
2. Send FFM Certificate of Completion
3. Complete KHBE Training

CAC and IPA FFM Training

The following slides show the steps for accessing and completing the FFM training.

FFM Training

1

Take FFM Training Annually

Assisters are to complete the FFM training for their role as their first training.

The FFM training can be started at https://portal.cms.gov/wps/portal/unauthportal/home/ A quick reference guide for Plan Year 2018 Registration and Training can be found here.

FFM training covers marketplace function and procedures and lays the foundation for understanding the terminology and eligibility of the ACA.

FFM modules teach Assister role responsibilities, Health insurance, Marketplace and ACA basics, eligibility, affordability programs, appeals and exemptions, SHOP, working with special populations, community outreach and customer service, privacy and fraud and advanced Marketplace issues.

The FFM Training has an exam that must be passed with a score of 80% or more.

Trainees receive a Certificate of Completion from the FFM. You will send your Certificate of Completion to KHBE at KHBE.kynect@ky.gov for record keeping.

Estimated completion time varies based on individual and role.

FFM Training

System Requirements

- For your internet browser, use Firefox or Chrome
- If you are having issues, clear the cache/history of your browser
- Enable Javascript
- Download latest version of Adobe Flash
- Allow Pop-Up Windows
- Please read over Computer Configuration Requirements for additional guidance

IPA and CAC FFM Training

If you have forgotten your User ID or password, click the appropriate links below the **Login to CMS Secure Portal** button.

IPA and CAC FFM Training

Use the same User ID you created last year

DO NOT create a new User ID

If you've forgotten your User ID from last year, please use the

"Forgot User ID" link

IPA and CAC FFM Training

If the **MLMS** tab does not appear on your portal page, you will need to request access to the MLMS. See **page 34** for further instructions.

IPA and CAC FFM Training

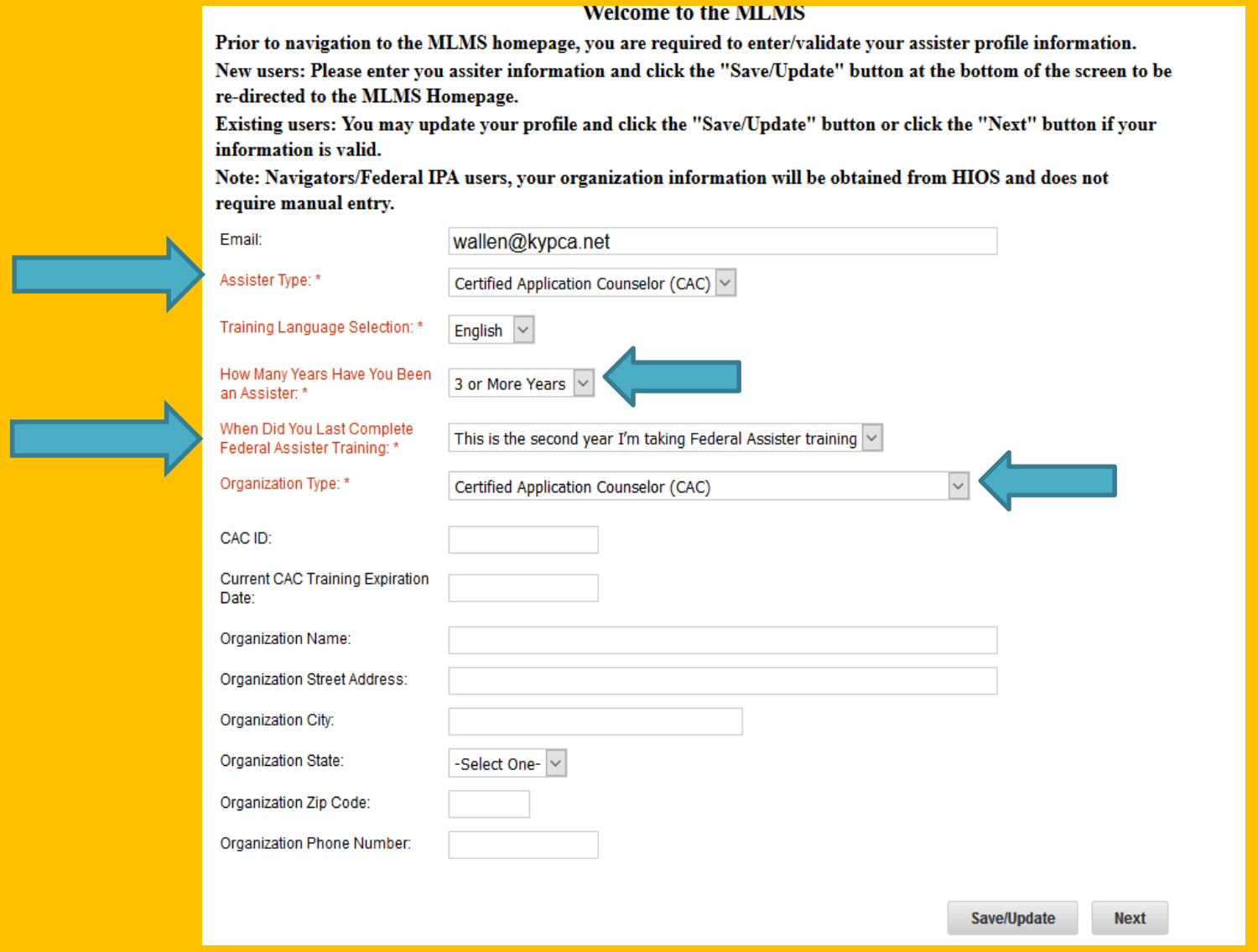
CAC Training

Assister Type: **CERTIFIED APPLICATION COUNSELOR**

When did you last complete Federal

Assister Training: **THIS IS THE SECOND YEAR I'M TAKING FEDERAL ASSISTER TRAINING**

Organization Type: **CERTIFIED APPLICATION COUNSELOR**



IPA and CAC FFM Training

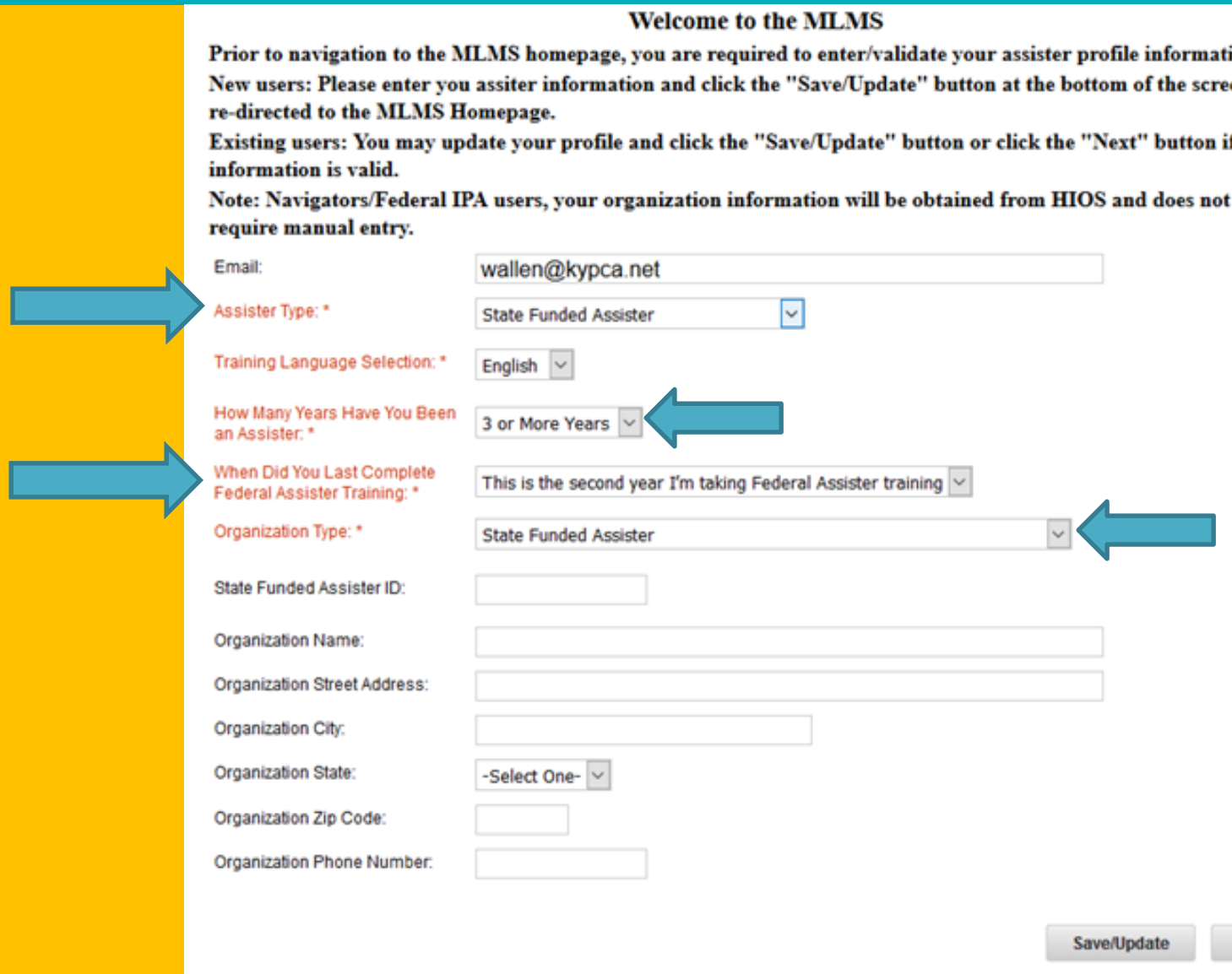
IPA Training

Assister Type: **STATE FUNDED ASSISTER**

When did you last complete Federal Assister Training:

1. **This is the first year I'm taking Federal Assister Training or**
2. **This is the second year I'm taking Federal Assister Training**

Organization Type: **STATE FUNDED ASSISTER**

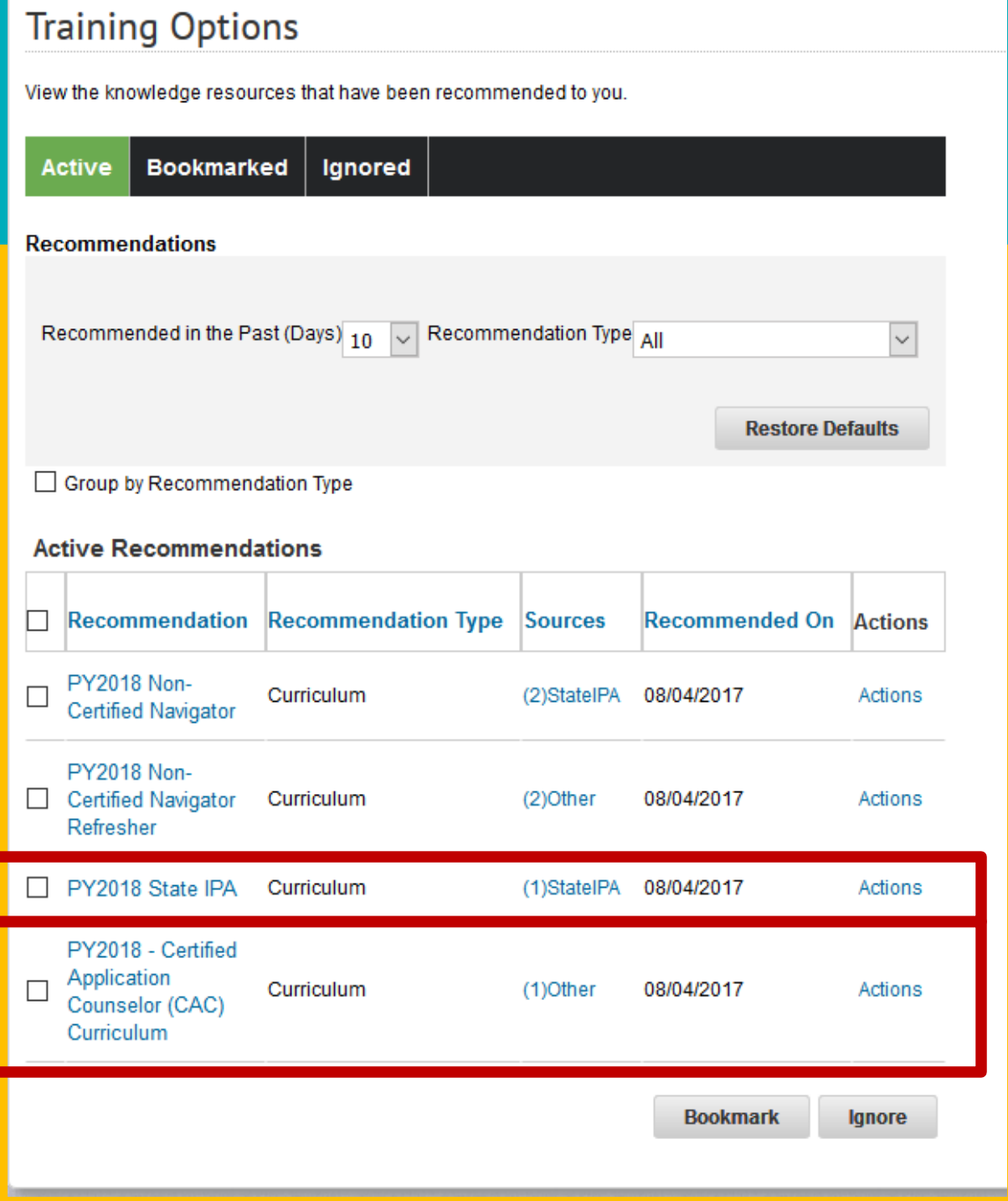


IPA and CAC FFM Training

Select the curriculum for your role

PY2018 State IPA Curriculum

PY 2018 Certified Application Counselor(CAC) Curriculum



IPA and CAC FFM Training

Training Options

View the knowledge resources that have been recommended to you.

Active | Bookmarked | Ignored

Recommendations

Recommended in the Past (Days) 10 Recommendation Type All

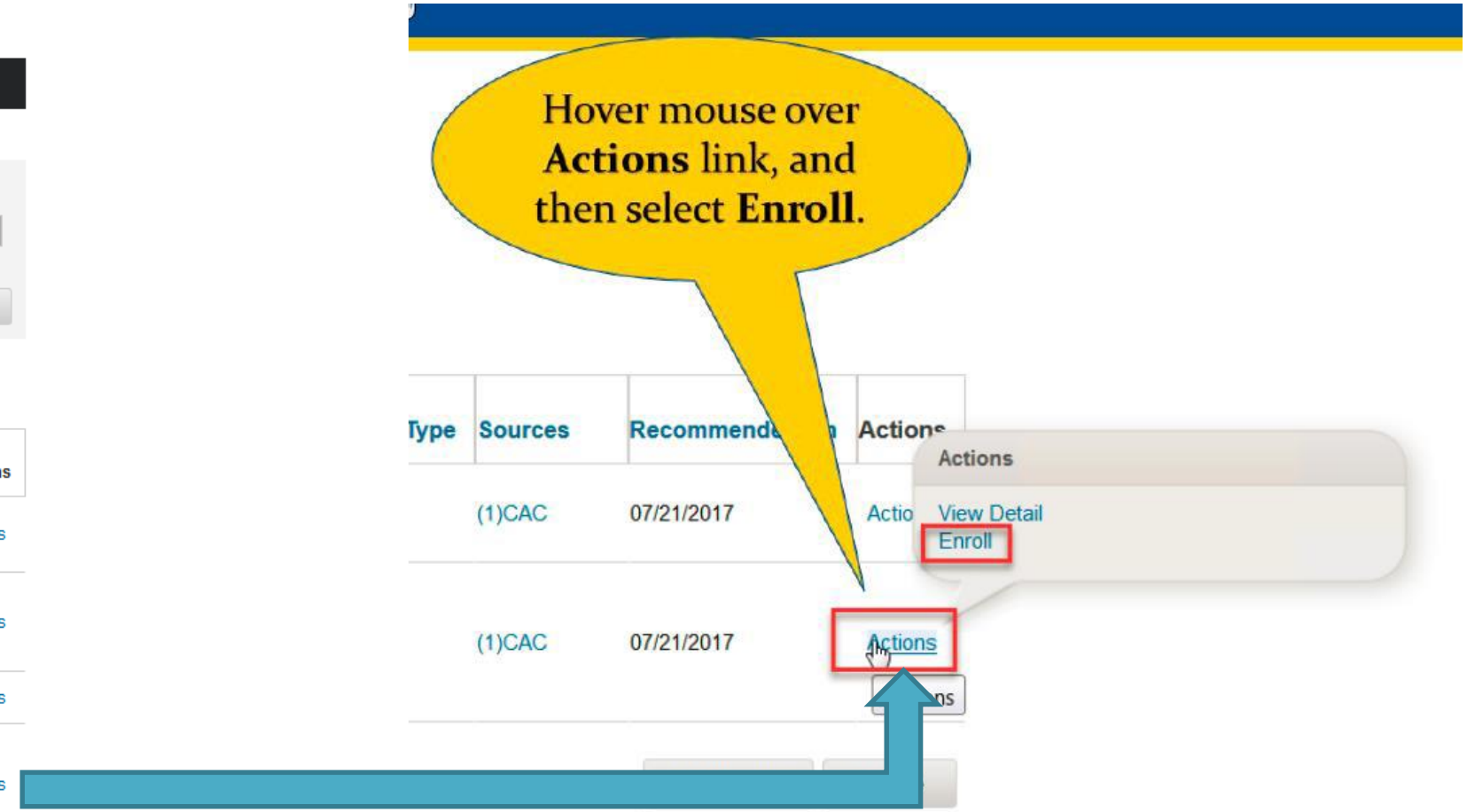
Restore Defaults

Group by Recommendation Type

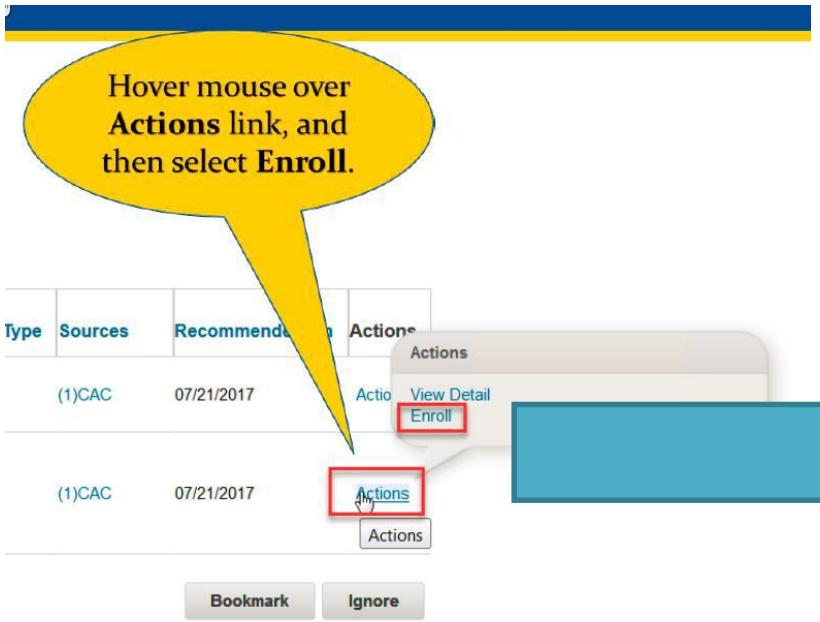
Active Recommendations

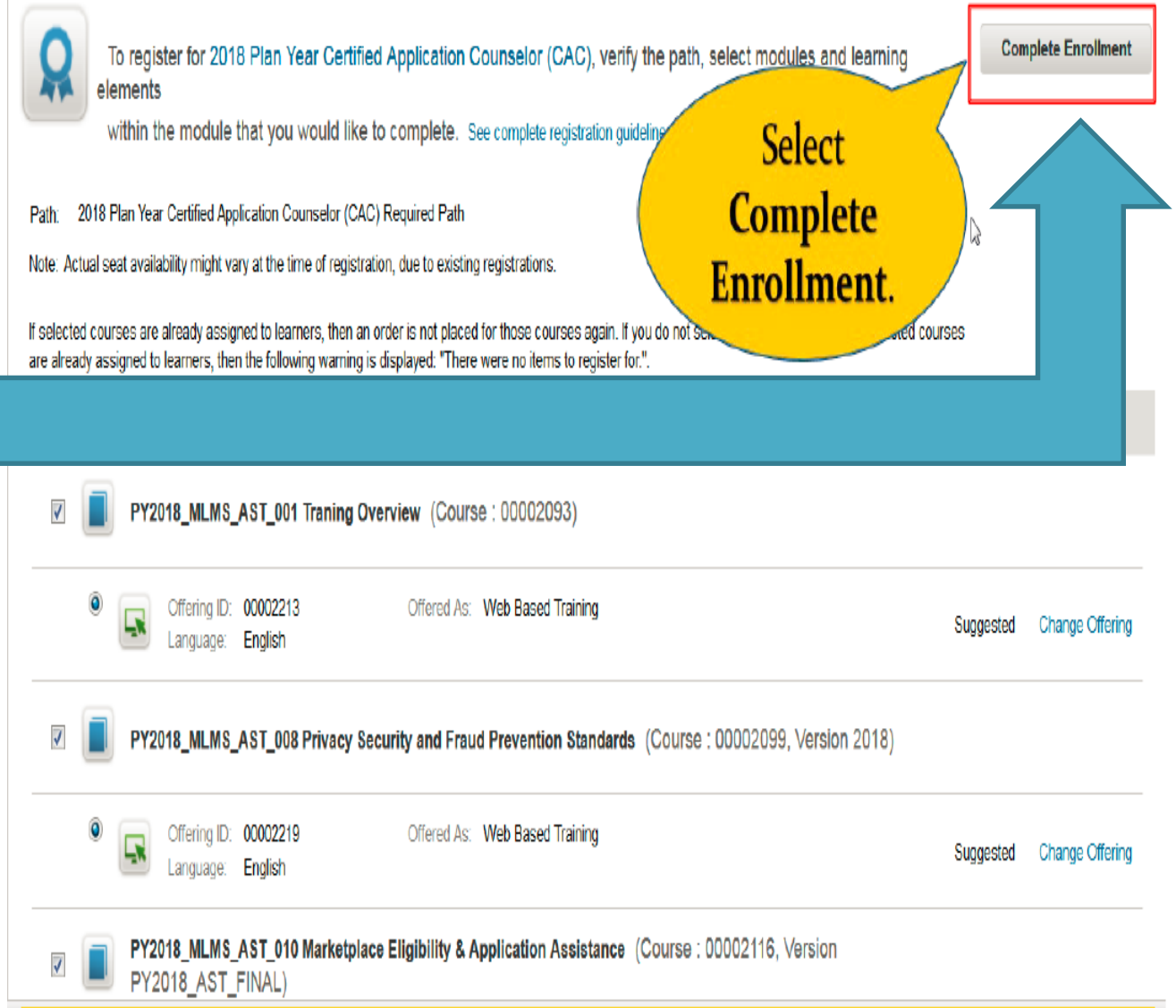
	Recommendation	Recommendation Type	Sources	Recommended On	Actions
	PY2018 Non-Certified Navigator	Curriculum	(2)StateIPA	08/04/2017	Actions
	PY2018 Non-Certified Navigator Refresher	Curriculum	(2)Other	08/04/2017	Actions
	PY2018 State IPA	Curriculum	(1)StateIPA	08/04/2017	Actions
	PY2018 - Certified Application Counselor (CAC) Curriculum	Curriculum	(1)Other	08/04/2017	Actions

Bookmark Ignore

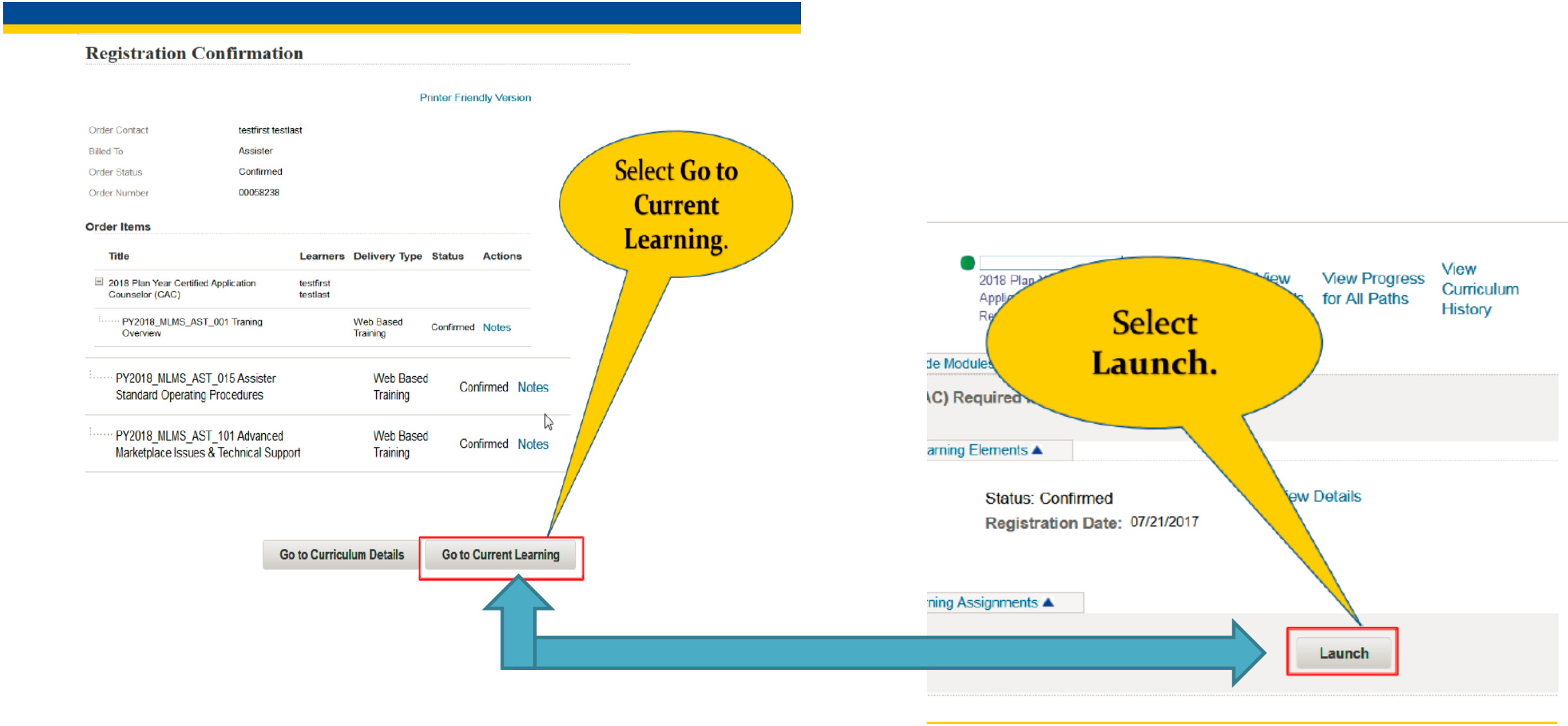


IPA and CAC FFM Training





IPA and CAC FFM Training



IPA and CAC FFM Training

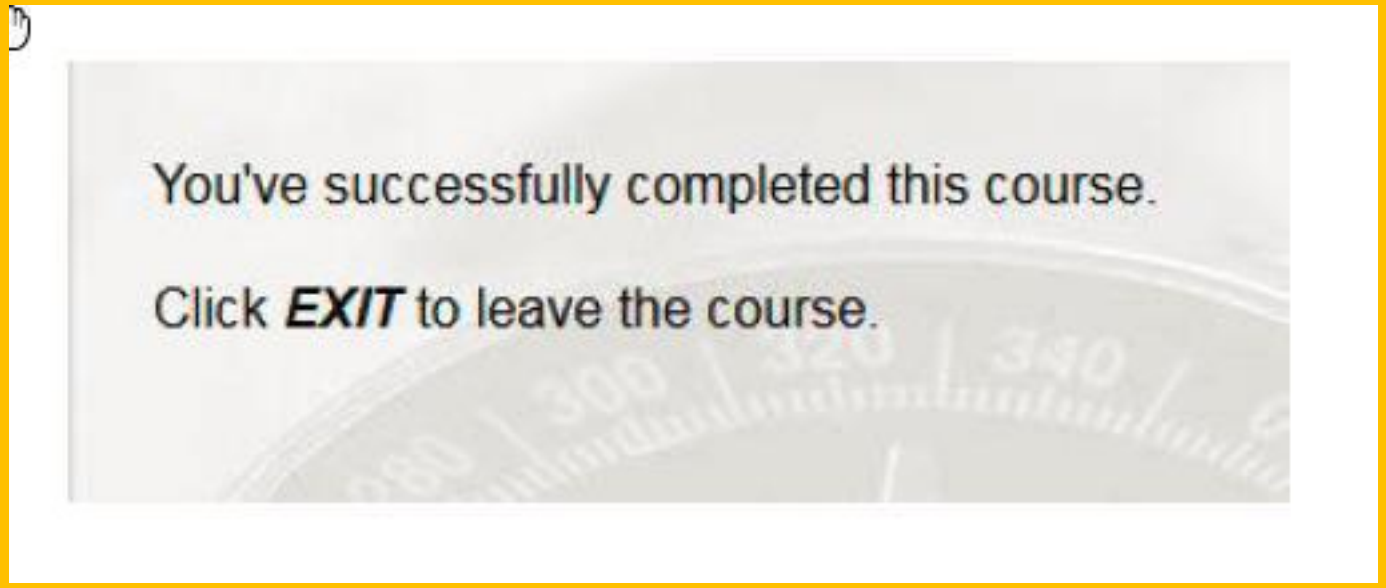
Training Details

- 6 modules for CACs
  - Other courses are optional but recommended for CACs to review
- 15 modules for state-IPAs
- Knowledge checks throughout the module
- Select every link on the page to activate the NEXT button
- Assessment at the end of each module (no comprehensive exam at the end)
- Must get 80% to pass
- Can retake the assessment (will not give you correct answers at the end)
- The Enterprise Portal times out every 30 minutes.
  - Click the Portal window every 28 minutes and look for a pop-up box to continue the current session. If you timeout, you may need to clear your cache, or log back in twice in order to see the MLMS>Training link on your CMS Portal page.

IPA and CAC FFM Training

Reminders:

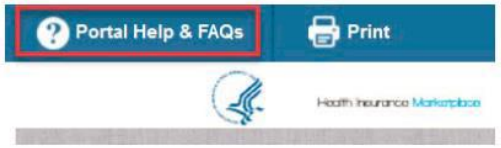
- Don’t click the browser’s BACK button
- If you click the Back button you will need to refresh the page and navigate to your previous location. You can use Back within the training content window.
- The course is not finished until you see the following words:



IPA and CAC FFM Training

Help Desk Resources

- CMS Enterprise Portal Help Desk
  - 855-267-1515
  - CMS_FEPS@CMS.hhs.gov
    - User ID / Password Issues
    - No access to MLMS



- MLMS Help Desk
  - MLMSHelpDesk@cms.hhs.gov
    - Can't print my certificate
    - Can't find curriculum
    - Training is not launching

Requirements

2

Send FFM Certificate of Completion

Remember

Send your FFM Certificate of Completion to the Kentucky Health Benefit Exchange via email, fax or mail.

Click here for a guide with steps for saving and printing your FFM Certificate of Completion.

Email: khbe.kynect@ky.gov

Fax: 1-502-573-2090

Mail: KHBE
Assister Certificate Manager
8 Mill Creek
Frankfort, KY 40601

Agent FFM Training

Insurance Agent Requirements to Participate in Kentucky
If you are interested in helping individuals or small businesses enroll in health coverage through the federally facilitated marketplace (FFM), you will have to meet the following requirements:

•Complete the FFM training as prescribed by Center for Consumer Information and Insurance Oversight (CIIO).

•Send your certificate of completion to KHBE.

Plan Year 2018: Information about FFM Registration and Training for new and returning Agents and Brokers is now available. Click the link for details.

Requirements

2

Send FFM Certificate of Completion

Remember

Send your FFM Certificate of Completion to the Kentucky Health Benefit Exchange via email, fax or mail.

Click here for a guide with steps for saving and printing your FFM Certificate of Completion.

Email: khbe.kynect@ky.gov

Fax: 1-502-573-2090

Mail: KHBE
Assister Certificate Manager
8 Mill Creek
Frankfort, KY 40601

Agent KHBE Training

KHBE State Training

Agents who wish to assist Medicaid applicants or households with both QHP and Medicaid eligible individuals must complete the KHBE State training.

- You must request access to KHBE State training by emailing your request with your name and agency to khbe.kynect@ky.gov
- After you have completed the KHBE State training, you may request a certificate of completion.
  KHBE does not require annual recertification

KHBE State Training

KHBE State Training

3

Complete KHBE Training

To enter the program an Agent or an organization manager makes a request for a new Assister by emailing the request to KHBE@kynect.ky.gov.

KHBE verifies the organization and sends a Welcome Letter to the individual.

Welcome Letter:
The welcome letter give step by step instructions for fulfilling all training and registration requirements.

- Complete FFM Training ✓
- Access KHBE SharePoint
- Complete KHBE State Training
- Create KOG Account
- Read Application Assister Dashboard Guide
- Read all Job Aids, Quick Reference Guides and General Resources and view webinars on the KHBE webpage.
- Save the KHBE website link for future reference

KHBE State Training

KHBE SharePoint Site

The KHBE SharePoint site is where Assisters can access any state required training and newly released, revised, or updated training.

The steps to access the SharePoint site is found in the KHBE SharePoint Guide. It is very important to follow each step exactly as outlined in the guide.

One step in the guide is to request access to the site. After you make this request, you will get an email that confirms your request has been approved.

Once you receive this confirmation, you will be able to log into the account and see a link to the CHFS Public SharePoint sites.

This is where you will begin the required training modules.

KHBE State Training

Access KHBE SharePoint

SharePoint Registration Guide

https://healthbenefitexchange.ky.gov/SiteCollectionDocuments/3%20SharePoint%20Registration%20Guide.pdf

- It is EXTREMELY important to follow the instructions in the guide
- Do NOT try to create more than one log in
- If you need help, please contact the KOG Helpdesk at KOGHelpdesk@ky.gov

KHBE State Training

Complete the KHBE State Training

Once you have access to the KHBE SharePoint, the next step is to complete the KHBE Training Modules.

- Access KHBE SharePoint
- Complete KHBE State Training
- Create KOG Account
- Read Application Assister Dashboard Guide
- Read all Job Aids, Quick Reference Guides and General Resources and view webinars on the KHBE webpage.
- Save the KHBE website link for future reference.

KHBE State Training

There are three modules included in the KHBE State Training found on the SharePoint site.

The KHBE Assister Training consists of information to facilitate understanding of the application, enrollment and case management functions in the benefind system.

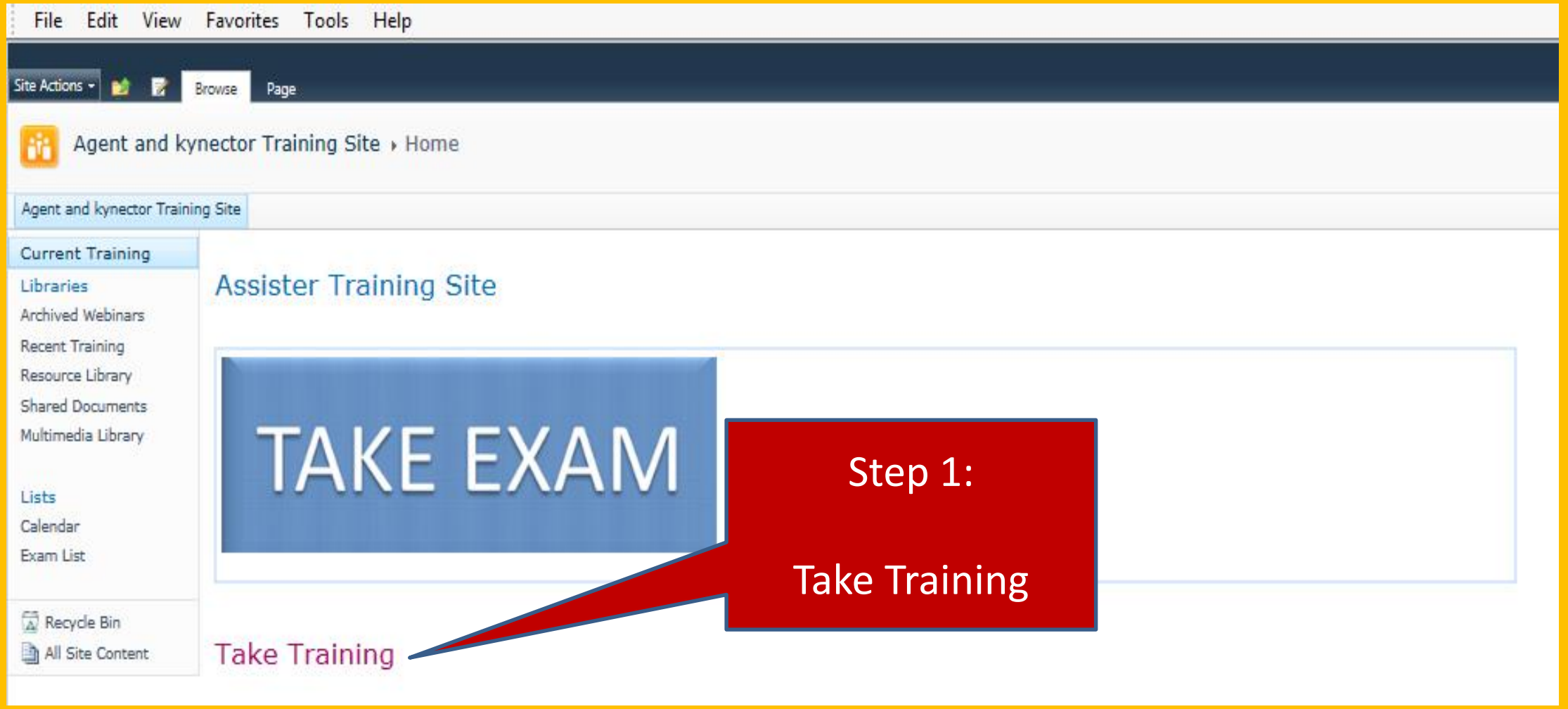
The three modules are:

KHBE Introduction and Overview Module
Prescreening and Basic Application
Complex Scenarios

There is an Exam at the end of the four KHBE State Training modules. As with the FFM, it must be passed with a score of 80% or more.

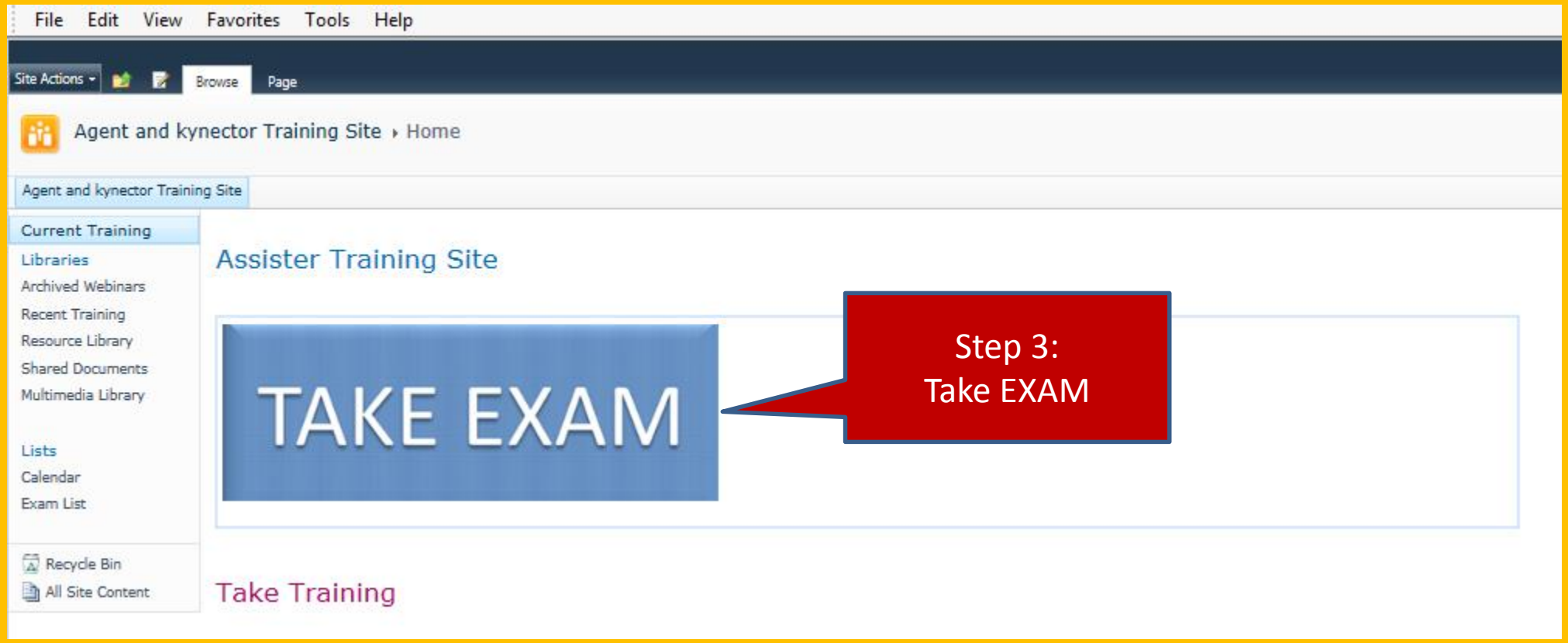
- **Our system does not automatically generate a completion certificate**. Once you have completed the required modules and passed the exam, you may request a copy of your certificate of completion as directed in the next section.

KHBE State Training



KHBE State Training

KHBE State Training



Current Training
Libraries
Archived Webinars
Recent Training
Resource Library
Shared Documents
Multimedia Library

Lists
Calendar
Exam List

Recycle Bin
All Site Content

- 20 Questions
- Multiple Choice

KHBE verifies Exam score and can issue a certificate of completion upon request.

Select one answer from the multiple-choice list to the right of each questions below.

1. Before you begin the exam, please select your role:

- Select an answer
- A. Insurance Agent
- B. Application Assister

2. Determinations for health insurance, qualified health plans and cost-sharing reductions are processed on _____.

- Select an answer
- A. HealthCare.gov
- B. kynect.ky.gov
- C. benefind
- D. KHBE.ky.gov

3. When applications are started in benefind and members are denied Medicaid, their eligibility results will show Assessed, their accounts are transferred to HealthCare.gov and they are sent a notice with eligibility and next steps.

- Select an answer
- A. True
- B. False

4. _____ can help decide where to start an application.

- Select an answer
- A. Prescreening
- B. QHP
- C. RFI
- D. Eligibility Result

5. To get results during the prescreening process, at a minimum, you must enter

- Select an answer

KHBE State Training

IMPORTANT

Do not move to the next step before sending us a copy of your FFM Certificate.
We need to verify your successful completion of both the FFM and the KHBE Training before you create your KOG Account.

FFM Certificates can be sent via email, fax, or mail.
Email: khbe.kynect@ky.gov
Fax: 1-502-573-2090
Mail: KHBE
Assister Certificate Manager
8 Mill Creek
Frankfort, KY 40601

A KHBE Certificate of Completion is recorded by the Health Benefit Exchange office.
A copy of the Kentucky State Training Certificate of Completion can be provided upon request.
Requests may be sent via email to KHBE.kynect@ky.gov.

KHBE State Training

The next step is to create a KOG Account.
This is how you will log into benefind.

- Access KHBE SharePoint
- Complete KHBE State Training
- Create KOG Account
- Read Application Assister Dashboard Guide
- Read all Job Aids, Quick Reference Guides and General Resources and view webinars on the KHBE webpage.
- Save the KHBE website link for future reference.

KHBE State Training

KOG (Kentucky Online Gateway) Account

Once KHBE has received confirmation that all training has been successfully completed with a passing score, you will receive an invitation from your organization administrator to create your KOG account to access the Assister Dashboard.

- The KOG account allows users to log into the local systems and the Medicaid application in benefind.
- The Kentucky Online Gateway Account Creation Guide will provide the steps to create a Kentucky Online Gateway (KOG) account.
- CHFS uses KOG to approve and verify accounts for business partners like Application Assisters.
- You will use your KOG account each time you sign in to work with a client on benefind.
- **It is extremely important that users do not create more than one KOG account.**

KHBE State Training

It is important to read the Dashboard Guide and all other Job Aids, Quick Reference Guides and Webinars, and know what resources are available before you get started.

- Access KHBE SharePoint
- Complete KHBE State Training
- Create KOG Account
- Read Application Assister Dashboard Guide
- Read all Job Aids, Quick Reference Guides and General Resources and view webinars on the KHBE webpage.
- Save the KHBE website link for future reference.

KHBE State Training

Web address:

https://healthbenefitexchange.ky.gov/Pages/home.aspx

The home page is shown here with useful phone numbers and links.

There is a tab dedicated to Agents and Assisters.

KHBE State Training

You will find helpful links and resources throughout the site, but let's take a closer look at the Training Materials and Webinars.

KHBE State Training

General Resources

General Resources

Kentucky HEALTH Quick Facts

How to change your Managed Care Organization and MCO Change letter

2017 Periodic Data Matching FAQs Published April 3, 2017

Tax Reference Sheet for Marketplace Forms Published Jan. 24, 2017

Kentucky Assister Consent Form Revised Nov 2016

2017 Qualified Health Plan and Medicaid Federal Poverty Level Chart Effective 04.01.2017

1095-A Reference for Agents and Assisters

Regional Forum Presentation

Helpful Information on How to Print your FFM Certificate

Assister Organization Map by County

MOVEIT Instructions

Job Aids

Job Aids

Helpful Information for an Application

How to Use the Agent/Assister Search Tool

Identity Proofing

Lawful Permanent Residents and Applicants for Adjustment

Non-Citizen Documentation

When to File as Head of Household

Alimony Paid

Basic Wage Stub with Overtime

Quick Reference Guides

Quick Reference Guides

Interview Guide for Agents and Assisters

Privacy and Security Guide

Kentucky Online Gateway Account Creation Guide

SharePoint Resource Guide

Understanding Immigration and Eligibility Guide for Agents and Assisters

Income Guide 2017

Kentucky's Glossary for Agents and Assisters

Helpful Resources

KHBE State Training

The Agent and Assister Webinars page is where you will find past webinars hosted by either KHBE or CMS.

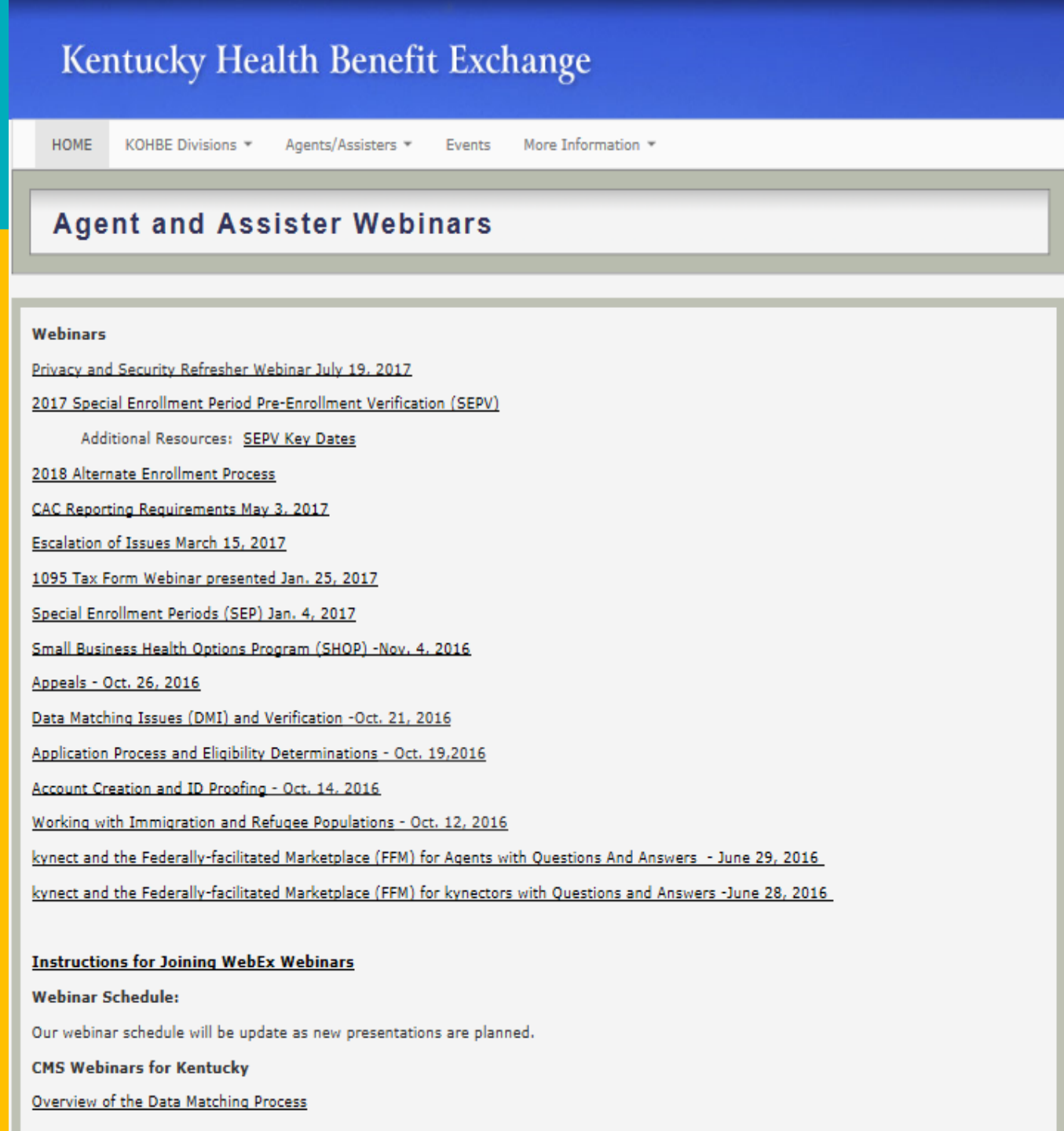
New webinars, like this one, are added as they are completed.

Webinars are used to bring new information, clarify instructions or as a refresher on familiar topics.

Each webinar is dated, in order of most recent, to assist in understanding the relevance and timeliness of the topic.

Instructions for joining KHBE webinars are also posted here.

CMS Webinars



KHBE State Training

Favorite place the KHBE website

- Access KHBE SharePoint
- Complete KHBE State Training
- Create KOG Account
- Read Application Assister Dashboard Guide
- Read all Job Aids, Quick Reference Guides and General Resources and view webinars on the KHBE webpage.
- Save the KHBE website link for future reference.

These resources will help you in a variety of scenarios and situations.

If you need further support from the Kentucky Health Benefit Exchange, please email KHBE.kynect@ky.gov

KHBE State Training

1 ✓

Take FFM Training Annually

2 ✓

Send FFM Certificate of Completion

3 ✓

Complete KHBE Training

KENTUCKY HEALTH BENEFIT EXCHANGE
HEALTH INSURANCE
IS FOR EVERYONE. GET YOURS.

Thank you